

UNIT 1 CUSTOMER BUSINESS ANALYSIS AND STRATEGY

September 2002

(FAC 2001-09)

Duty	Advise customers on their acquisition-related roles as well as the development and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.
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Conditions	Given information gained through interaction with customers and prospective suppliers and established mission requirements.
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Overall Standard(s)	Accurately advise customers on acquisition-related responsibilities as well as the development and implementation of strategies geared to obtaining the supplies and services needed to meet the Government's functional needs.
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Policies

<i>FAR</i>	<i>Agency Suppl.</i>	<i>Subject</i>
1.102		Statement of guiding principles for the Federal Acquisition System.
3.104		Procurement integrity.
5.404		Release of long-range acquisition estimates.
7.1		Acquisition plans.
7.2		Planning for the purchase of supplies in economic quantities.
7.3		Contractor versus Government performance.
13.101(a)		Economic purchase quantities when planning simplified acquisitions.
14.212		Economic purchase quantities (supplies).
34.003		Major system acquisition responsibilities.
34.004		Major system acquisition strategy.
35.016		Broad agency announcement.
37.102		Policy of reliance on the private sector for commercial services.
52.207-4		Economic Purchase Quantity – Supplies.

Other KSA's

1. Knowledge of business roles and responsibilities of line managers, program managers, and others involved in the acquisition process.
2. Knowledge of the Government budgeting and accounting processes and their importance in the acquisition process.
3. Knowledge of the business characteristics of suppliers serving the contracting activity's customer base.
4. Knowledge of the market for the types of supplies and services typically needed to serve the contracting activity's customer base.
5. Ability to effectively communicate with prospective suppliers and a diverse customer base.
6. Ability to plan effectively.

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7. Ability to maintain the honesty and integrity of the acquisition process.
8. Ability to use think creatively in finding ways to meet customer needs.

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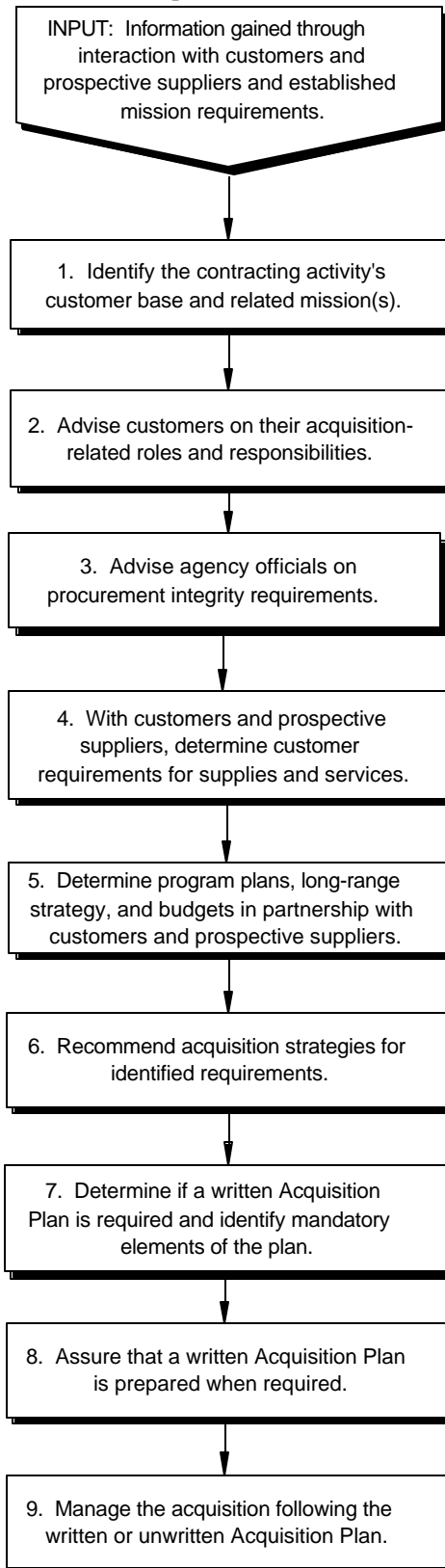
Other Policies and References (Annotate As Necessary):

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Tasks	Related Standards
1. Identify the contracting activity's customer base and related mission(s).	Correctly identify present and prospective customers of the contracting activity.
2. Advise customers on their acquisition-related roles and responsibilities.	Correctly describe customer acquisition-related roles and responsibilities, including: <ul style="list-style-type: none"> • Acquisition planning. • Designating requiring activity resources to carry out the acquisition plan (e.g., requirements research, proposal evaluation, and performance evaluation). • Preparing requirements documents. • Safeguarding source selection and proprietary information.
3. Advise agency officials on procurement integrity requirements.	Correctly describe: <ul style="list-style-type: none"> • Prohibitions against disclosing procurement information; • Prohibitions against obtaining bid or proposal information; • Requirements related to contacts regarding contractor employment; • Prohibitions related to former officials receiving contractor compensation; and • Requirements for disclosing, protecting, and marking source selection information.
4. With customers and prospective suppliers, determine customer requirements for supplies and services.	Correctly determine customer requirements using information from available sources, including: <ul style="list-style-type: none"> • Acquisition histories. • Planning, programming, and budgeting documents. • Surveys of requiring activities and other program planners. • Participation in meetings to plan, program, and budget for agency missions. • Other documents (e.g., requiring activity reports and staff meeting minutes).

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Tasks	Related Standards
5. Determine program plans, long-range strategy, and budgets in partnership with customers and prospective suppliers.	<p>Correctly identify an effective long-range strategy and related budget requirements using the following steps as a guide:</p> <ul style="list-style-type: none"> • Review customer program plans. • Identify relevant information from market research. • Estimate the market capability for accomplishing program objectives. • Select the appropriate method to accomplish program objectives (e.g., in-house performance, grant, memorandum of understanding, required sources, new contract). • Advise on budget requirements. • Advise on the proper use of the Governmentwide commercial purchase card.
6. Recommend acquisition strategies for identified requirements.	<p>Correctly identify issues for contracting, including:</p> <ul style="list-style-type: none"> • Required sources; • Competition requirements; and • Socioeconomic requirements.
7. Determine if a written Acquisition Plan is required and identify mandatory elements of the plan.	Correctly apply agency Acquisition Plan criteria and thresholds.
8. Assure that a written Acquisition Plan is prepared when required.	Assure that the acquisition plan follows FAR 7.105, agency, and activity requirements, including any requirements for concurrence or approval. Consider all the acquisition planning duties identified in this workbook.
9. Manage the acquisition following the written or unwritten Acquisition Plan.	<p>Complete acquisition tasks using the Acquisition Plan as a guide to:</p> <ul style="list-style-type: none"> • Assign responsibilities for plan elements. • Evaluate progress. • Determine the need for changes to meet objectives.